ADVISEN
Insurance Intelligence®

Q1: Contact Information

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Q2: Company Website www.informapplications.com

Q3: Product NameNote: Please include all names of systems currently supported

INFORM 7
INFORM 8

Q4: Technology Deployment Options Web: Vendor Hosted (ASP

Q5: Lines of Business Supported

State WC	Standard
Federal WC (USLH, Jones Act)	Custom
General Liability	Standard
Auto	Standard
Property	Standard
Professional	Standard
Disability	Standard

Q6: Other lines of business supported

Construction - CCIP and OCIP

Q7: Other related functionality	Policy Administration

Q8: Please describe your system's document management capabilities.

Documents can be attached to claims, incidents, locations, exposures, legal proceedings, policy, transaction or vehicle. We support any type of machine readable document or e-mail. Documents can be loaded singularly, and we have options to load documents in a batch process.

Q9: Do you provide user-defined fields?	Yes, If Yes, are there any limitations on the number, field types or reporting capabilities on these fields? Creation of additional fields can only be done by the client system administrator.

Q10: Please identify all of the browsers supported by your system, including the earliest versions (i.e Internet Explorer 9)

IE 8 + for INFORM 7 and IE 10+ for INFORM 8
Chrome, FireFox

Q11: Please list the levels of hierarchy of your RMIS

Within an organization we support 5 levels plus the location name making it 6 levels of hierarchy but can also support attributes of the hierarchy. Plus we support department, county, state, zip code, country, work shift . We support geo codes for mapping.

PAGE 3: SYSTEM FUNCTIONALITY

Q12: Dashboards and Alerts

Configurable dashboard	Standard
Downloadable	Standard
Email alerts	Standard
Dashboard alerts	Standard
Clmt. Search from home page	Standard
Multi-level hierarchy	Standard
Multi-currency	Configurable
Multi-lingual	Custom

Q13: Maximum amount of dashboards allowed by your system	Unlimited

Q14: Please describe any unique dashboard or alert that we did not list above

We use portal pages to support dashboards that are configurable. We also have power portals wherein a group of charts, reports, and maps are dynamically sensitive to a set of parameters, such as coverage, policy year and other database elements.

Q15: Standard Reports

Scheduled reports with auto distribution	Standard
Report Bursting	Standard
Ad hoc reporting	Standard
“As of” date reporting	Standard
Searchable PDF reports	Standard
Download to Excel and PDF	Standard
Offline data manipulation allowed	Standard
Policy Erosion reports	Standard
Loss triangles for data development and trending	Standard
Deductible reimbursement tracking	Configurable
Profiling, red-flagging events	Standard
Goal tracking	Standard
Loss forecasting	Standard
Experience Modification	Custom
Cost of risk/premium allocation	Standard
Underwriting/rating calculation	Custom

Q16: Policy and Exposure Tracking

Policy tracking (list of policies)	Standard
Policy management (details of policies)	Standard
Underwriting	Custom
Certificate tracking	Standard
Certificate issuance	Standard
Property tracking (values)	Standard
Safety/loss control analysis	Standard
Bonds/contracts tracking	Custom
Asset Management	Custom
COPE Tracking	Standard
Fleet Management	Standard
Integrated Policy Management	Standard
Basic Values / Exposures Entry	Standard
Retention vs Premium Calculator	Configurable
Coverage Gaps and Overlaps	Configurable
Intelligent Mapping	Standard
Please explain your intelligent mapping software capabilities	We utilize Google maps to display relevant information by the location's latitude and longitude.

Q17: Analytics & Metrics Analysis: Please describe any third party software used to perform business analytics

We use the Web FOCUS Business Intelligence suite of tools from Information Builders (Our Parent company) as our technology platform.

Q18: Typical Analytics/Metrics reports

Key Performance Indicators (KPI) measurements	Standard
Loss Forecasting	Standard
Cost of risk allocation	Standard
Heat Map reports on loss distribution/location	Standard
Other Key Reports	A whole host of reports, charts, and maps with Loss stratification reports, Aging of claims by transaction date

Q19: How, if at all, does your RMIS compare client data to non-client data?

We maintain tables of both the internal claim number to which we may reference client information, and the claim number that is maintained by the carriers.

Q20: Please describe any features or functions that are designed to support enterprise risk management processes:

Respondent skipped this question

Q21: Please provide a list of current innovations that you are currently working on to deploy at a future date

Geo Mapping overlays of weather related phenomenon.

Q22: Other notable features or comments

We provide a module that can statistically categorize the ultimate range of a claim for a client, as soon as the claim is entered into the system, it is called Claim Predator.

PAGE 4: Claims Self Administration Features

Q23: Please describe how your system develops a TCOR (total cost of risk) estimation

ur solutions are set up to offer our Clients the flexibility to input this data manually into a custom intake screen where the User can enter the various components of their Total Cost of Risk and then use this tool to allocate the Total Cost of Risk and/or a percentage of it to their Field Operations. We can use our reporting tools to link the data available in our Modules: (Policy, Claims, Fleet, RMIS, an Custom Intake screens) to develop the Total Cost of Risk for the Client. In short, we have a parametrized report, we can do a custom report or the client can use drag & drop to create their own report. We have databases to collect policy information, and exposures, and can relate them to each other to create a variety of TCOR reports.

Q24: Please describe your business process / workflow collection tools

We have claimant search, diary listings and open claim listings to select the claims that need to be worked on. We have tabbed claim entry forms that address different aspects of the claim information. Letter libraries , vendor libraries , reference table maintenance etc. Our modules have been designed to streamline the data entry process and to capture the critical dates, times, and details that were entered, and the individuals involved in the process.

Q25: Claims management features

Customizable Diary	Standard
Adjuster Notes access (if applicable)	Standard
Reserve Analysis (worksheet)	Custom
Other Claim Management Features	secure electronic submission and capturing of claim information from carriers.

Q26: Claims administration features

Incident Tracking	Standard
Check writing	Custom
Utilization review	Standard
Medical Bill Repricing	Unavailable
Transitional Work Management	Standard
Built-in Reserve Estimation Worksheets	Custom
Fraud Detection capability	Custom
Encryption of sensitive data	Standard
Subrogation & Salvage Tracking	Standard
Comprehensive Litigation Management Tracking	Standard
Adjuster Tracking/Performance	Standard
Other Claim Administration Features	Physicians Panel, Report claims to CMS(Medicare)

Q27: Third party reporting and documentation

OSHA reporting	Standard
NCCI Reporting	Standard
1099 Reporting	Standard
First Report of injury	Standard
FROI/SROI reporting	Standard
CMS reporting	Standard
EDI reporting	Standard

Q28: Other notable features or comments

Send claims to the carrier or TPA electrically

PAGE 5: Software, Technology and Security

Q29: Did your organization develop the software platform your solution resides on?	Yes

Q30: If another organization develops the software platform your solution is based upon, please describe this relationship.

We use WebFOCUS and develop the RMIS software ourselves.

Q31: Who maintains your software platform?

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Q32: What software is used to track your RMIS solution's defects, bugs, and problems?

Service Desk hosted by Citrix

Q33: Do you have a need to develop software outside of your primary platform? No

Q34: If so, what applications are involved?

None

Q35: What third party vendors do you partner with to provide functionality?

Analytics Plus is used to do the predictive claim modeling with our Claim Predator Module.

Q36: Does your firm use off-shore resources at all? No

Q37: Who maintains your software infrastructure?

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Q38: Are there multiple, separate data center facilities used to host data for global clients?

No

Q39: Do you provide the ISO 27001 certification to your clients? No

Q40: Does your solution allow for full encryption at rest for all client data in all hosting facilities used by your organization? Yes

Q41: Does your solution provide the ability to encrypt specific fields while at rest? Yes

Q42: What technology/data standards are used/supported by your application? (e.g. WSI, WSS, ACCORD XML) *Respondent skipped this question*

Q43: Describe encryption protocols used within, and in communication with, the product.

SSL/TLS, SFTP

Q44: Describe any API offered

N/A

Q45: CLIENT HOSTED DEPLOYMENTSMinimum recommended hardware requirements and any third party software licensing requirements

N/A

Q46: CLIENT HOSTED DEPLOYMENTSDoes the product support, and has it been tested with, virtualization software (VMware)?

N/A

Q47: VENDOR or THIRD PARTY HOSTED DEPLOYMENTSSAS 70 audit (vendor/third party hosted versions only)	Type II
Q48: Does your company purchase cyber risk coverage to protect your clients' data assets?	Yes

Q49: Any additional comments related to software, technology and security

With respect to question 47, We do SSAE16 Type 2 SOC 1. SAS70 and SSAE16 are NOT audits, they are examinations.
With respect to data at rest, this is an open ended question because our experience is that there is more than one way to define data at rest.

PAGE 6: Interfaces

Q50: List standard insurer/TPA interfaces (in order of frequency)

Sedgwick
Galagaher Basset
Broadspire
Liberty
ESIS
Travelers
ACE
AIG
and many more

Q51: Please describe your approach to state EDI compliance (e.g. vendor partnerships) and the breadth of your existing capabilities.

IAIDABC- REL.3 is what we use
CMS - Medicare Interface

Q52: Other System interfaces

User authentication (e.g. LDAP)	Standard
HR Payroll	Unavailable
Accounting	Unavailable
External Document Management Services	Custom
External Bill Review Services	Custom

Q53: Other interfaces not listed above

Enablon Web Services
WICRS
Certain TPA, Carrier to electronically to send first reports of claims
Analytics Plus

Q54: What is your hourly rate for custom interface work?

$175 per hour

PAGE 7: Training, Support and Customer Feedback

Q55: Briefly describe your standard training approach (when and to whom) and your methods utilized

Personalized training is done at start up by the INFORM AE(Account Executive). Can be on-site or via the Web

Q56: Number of staff dedicated to training and/or support

Any of a number of AEs

Q57: Support types offered:

Dedicated (not pooled) support person,
Online help, Print user manual,
Screen “tips” or mouse-overs, Video tutorials

Q58: Telephone support hours

9 to 5 EST/EDT. We have a tech support email box for reporting issues 24/7.

Q59: Position regarding support of prior product versions

We support prior product versions until the client migrates to a later release, up until the technology can no longer be supported on the platform.

Q60: Do you host a user conference? Yes

Q61: What was the date of your last user conference?	August 2014
Q62: How many customers / prospects were in attendance?	30+

Q63: What other methods do you use to obtain customer and/or prospect feedback and input on feature priorities?

Questionnaires, conference meetings with clients or multiple clients. Our AE's constantly look for client feedback.

PAGE 8: Implementation

Q64: Describe your delivery team's structure:Do you have a dedicated service team approach or does one account executive handle multiple responsibilities?

Our AE serves a single point of focus for the client. However, the AE is supported by various teams that perform tech support, data conversions, development etc.

Q65: Do you have dedicated business analysts?

Our AEs provide this function.

Q66: Describe your process of tracking delivery team activities

We use the Service Desk hosted by Citrix. In addition, we meet collectively on projects to track project progress.

Q67: Do you have a defined methodology for implementing projects?

We define an implementation plan for each project. There is a format that we follow on mid to complex projects. An AE will serve as the project manager responsible to the senior management.

Q68: Do you have a defined oversight or governance process for your implementations?

We use the Service Desk to monitor the progress and issue s during a project as well as ongoing support services for a client. Overall review is by Senior Management.

Q69: How long is the typical implementation time?

30-120 days

PAGE 9: Business Information

Q70: What was the year of your first RMIS implementation?	1985

Q71: Parent Company (if applicable)	Information Builders Inc.

Q72: Business Locations

NY, NJ, SC, TN

Q73: Top Officers

Top Executive 1:	Alan Josefsek
Top Executive 2:	Gerald Cohen
Top Executive 3:	Harry Lerner

Q74: Number of employees (RMIS division only) in 2013	*Respondent skipped this question*
Q75: Number of employees (RMIS division only) in 2014	*Respondent skipped this question*
Q76: Total annual revenue for all product versions offered	*Respondent skipped this question*
Q77: Approximate percent of revenue spent on R&D	*Respondent skipped this question*
Q78: Customer Statistics	*Respondent skipped this question*

Q79: Largest customer markets (Please rank top 5)

Construction	4
Hospitality/Entertainment	1
Non-Profit	3
Public Sector	5
Retail/Distribution	2
Other (please specify)	Restaurant and Service Industries

Q80: Please rank order how you obtain most new accounts (unbundled systems only)

Competitive RFPs	N/A
Sole source (no competition)	N/A
Client merger/acquisition	N/A

Q81: Top 5 RMIS competitors	*Respondent skipped this question*

Q82: Predominant programming language	Other (please describe) WebFOCUS BI technologies, HTML5, jsp, JavaScript, jQuery, etc.
Q83: Databases supported	Other (please describe) WebFOCUS/ MySQL

Q84: Please identify all mobile devices that can be used by your system

HTML5 Supported devices

Q85: Please list the RMIS-related revenue for the following years:	*Respondent skipped this question*
Q86: Please identify all revenue-generating activities:	Software license sales, Custom applications, Data Conversion and Consolidation activities, Consulting, Ongoing maintenance
Q87: Please indicate the percentage of revenue derived from these activities:	*Respondent skipped this question*
Q88: Does your RMIS act as a "channel partner" for any 3rd party information or a la carte services?	No

PAGE 10: Pricing

Q89: Pricing approach for ongoing usage (check all components that drive cost for client; do not check if no charges associated)	Module/LOB pricing, Named users, Non-named users (concurrent usage), Read only (limited access users), Data conversions/feeds/EDI, Maintenance, Training, Integration with HR, A/P systems
Q90: Approximate total annual cost (ranges) excluding initial implementation	*Respondent skipped this question*

Q91: What are the associated fees and hourly rates to implement your system?

Flat Start-Up
Flat Fee historical data conversion
Flat Fees for Module Set or Initialization
Ongoing licensing (based on the module and tiered by the number of users for each module and is discounted for multiple module purchases), vendor feeds (based on frequency and type), and support (based on the size and scope of the system @175 per hour)

Q92: What is the typical one-time cost to implement your system?

$7,500 - $30,000. These can be more or less depending upon the actual size and complexity, but normally they run in this range.

Q93: Additional comments on pricing

ll our fees are based on our $175 per hour rate.
With respect to question 90 the cost structure we use is not reflected in your cost matrix, therefore we cannot check any of those boxes without potentially being misleading.

PAGE 11: Other Information

Q94: Please comment on your recent system uptime/availability performance, as well as methods that you use to measure and monitor it.

Our systems have had an up time of 99% or greater. The rest are scheduled maintenance.

Q95: Please describe if your RMIS is multilingual.If so, please list the other languages supported.

English
We do handle Chinese mandarin data and can handle other foreign languages in terms of data.
We also do currency conversions.

Q96: List the top 3 reasons that you believe set you apart from other RMIS vendors

1	Excellence in Service
2	Superior Systems Architecture
3	Excellence in data consolidation accuracy